User Guide for LabelTrace (non GPASS)

General

LabelTrace is designed for use in GP practices to allow simple, rapid printing of labels for specimens, request forms and other documents for a single patient, based on patient data held in the clinical system plus, if appropriate, additional data selected at print time.

The patient data is copied from the practice's clinical system to LabelTrace's own database, which is regularly synchronised with the practice's clinical system. To achieve this synchronisation, a data file (or set of data files) containing a copy of the current patient data is generated from the clinical system prior to each synchronisation. This data is then preprocessed to a standard form suitable for importing into LabelTrace. On synchronising, LabelTrace will add, edit or make active/inactive , as appropriate, all relevant patients. This synchronisation procedure should be run as often as required - typically once per day.

[Note that you will see some references to QuickTrace in the following guidance. LabelTrace is in fact QuickTrace operating in a special mode.]

Logging On

To start LabelTrace, click the "QuickTrace" desktop icon or go to Start/Programs/QuickTrace/QuickTrace. Enter "Lookup" as user name with password if required (The system manager may log on as "Manager", with optional password).

Running Synchronisation

Step 1. Generate a new export of patient data from your clinical system. Follow the specific instruction for your system. These are provided at the end of this document.

Step 2. In LabelTrace run the option "File/Synchronise patients with external data source".

Step 3. If errors are reported at the conclusion of synchronisation, use the "File/View Import Log" option to examine these and take any appropriate action in the clinical system. Note that each time synchronisation occurs, the summary data is appended to the end of the existing log file. Hence,you should regularly archive and/or delete the log file - but ensure all issues have been addressed first. To archive the log file, copy it to a location of your choice (or use "Save As" menu option while viewing the Import log to make a copy in a location of your choice) then delete the original. The log file may be deleted via the "File/Delete Import Log" option.

Reports

Two reports are provided The first lists all patients in the LabelTrace database who are inactive as they are no longer normal registered patients in the clinical database. The second is similar but only lists those patients who have been inactive for longer than a predefined period, set via View/System/General Preferences/Global. These patients may be deleted by means of the buttons provided on the report window (Manager only).

Printing Lab Labels

Summary - Printing a Label Set

- Select the patient via the Patient Browser
- Select the required label set
- Select data for any required fields
- Click the keypad to specify the number of sets of labels required

(- If the patient has no CHI, confirm at the prompt that you want to proceed, or cancel)

Selecting the Required Patient

To open the Browser window, click on the "Person" icon on the menu bar or use the View/Patients menu option. enter data for the required patient in one or more fields and press the Return key (or click OK) to view a list of matching patients. Note that the check box for "Allow partial matches" must be checked as otherwise only exact matches are displayed. The "Default" button is used to select the default data entry field for look up data. For example, if you click into the Surname field so that the cursor is flashing in this field, then click the Default button, the cursor will always be in the Surname field when the Browser window first opens.

If only one matching patient is found, the Labelling window will be opened with the Patient name and CHI displayed for confirmation. If multiple matches exist, a list of all matching patients will be presented with full name, date of birth and first line of address. To select the required patient, double click on the name or click once on the name then click View to select the patient. Optionally, the UP/DOWN cursor keys may be used to highlight the required patient at which point pressing the Return key will select that patient for labelling.

Printing Labels

The system can be configured to have up to six label sets available for selection, each of which may comprise one or more labels. The required label set is selected by clicking on the name of the set. The currently selected set is indicated by a highlighted "radio button" next to the name.

The current version of LabelTrace allows selection of up to seven fields in addition to patient data. These are Doctor plus six user-definable fields. To select an entry for one of these fields, click on the down arrow to the right of the field and click on your selection in the resulting list. Any fields not required on the current label set will be hidden. For example a simple mailing label has only patient data on it so no additional fields are visible when "Mailing Label" is selected. The Doctors field allows the relevant doctor's name and cipher number to be included on the lab label.

Setting Preferences

To set your preferences for LabelTrace, log on to the system as Manager then select the View/System/LabelTrace Preferences menu option. This opens the Preferences window and allows you to specify the default selection for each data field, the port to which the label printer is connected and the Print Density setting.

The port to which the printer is connected may be specified by clicking on the "Local -

Label Printer" tab and selecting from a drop down list. If you are uncertain which port the printer is connected to, try each in turn, though generally it is likely to be COM1 or COM2, If however you are using a standard printer cable connection, it is almost certain that you should select LPT1. Select FILE if you are sharing the printer, utilising LabelTrace Print Manager to drive the printer. The path to the shared folder into which label data will be saved should be entered by clicking the Browse button (with three dots) and . This will normally be a folder called "LTPRTMGR" on the C drive of the PC driving the printer.

The print density is a number from 1-30. The higher this number, the darker the print on the label. Set 10 for LP2824 printers

You may specify the doctor's name to be selected by default, on opening, by clicking on the down arrow at the right hand end of the selection box then clicking on the required entry in the resulting drop down list. The defaults for User Fields are set similarly.

Managing Data Fields

Managing the additional data fields which may be included on labels produced via LabelTrace is carried out by logging on as a Manager then selecting the View/System/Doctors (etc) options from the Main Menu bar.

The available fields are Doctor and six user-definable fields, each of which stores multiple entries for selection at print time. In addition, some fixed practice information can be stored in a Practice Details section.

Doctor Field

This field is used to hold the names and ID Numbers (as known at the labs, also called cipher number) of doctors as they should appear on labels.

User-definable Fields

Up to six user-definable fields may be utilised. These must be set up giving the field a name (Label) and then entering lists of possible values. To enter names for the fields, select the View/System/User Fields option from the menu bar. Click on the user field you wish to set up then click on Edit. Now enter the "Label" for the field (NB this is also the field name as used within label templates). Optionally add a description of the field. Click OK to save these settings. The "Label" for the field will now be shown when you click on the View/System/User Fields Values option on the menu bar allowing entry of the data for the field.

Adding/Editing Data for Fields

On Selecting View/System/Doctors, you will be presented with a list of the data, if any, already entered in the Doctors field. If you wish to select a user field for which to view and/or edit the data, then click on the View/System/User Fields Values menu item and select the field of interest. Having selected the field of interest you may add, edit or delete entries as follows.

The Doctor field and the user-definable fields operate identically:-

- to add an entry, click on the Add button then complete the field (or fields in the case of Doctor) as required and click OK to save the new entry.
- to edit an entry, click on the entry to highlight it and click Edit. Modify the data as required and click OK to save the new version.
- to delete an entry, click on the entry to highlight it and click Delete. Now click Yes to confirm deletion of the entry or No to Cancel.
- to rearrange the order of entries, select an entry by clicking on it then use the up/down blue arrows to drag the entry to the required position. They will be displayed in this order for selection prior to printing.

Selecting Practice Details opens a window with fields for Practice address, telephone number and code (cipher). This information is simply entered by completing or editing the fields and clicking OK to save the data or Cancel to exit.

Installing the LabelTrace Client

Note that the client software for the LabelTrace system is actually a version of the "QuickTrace" system. Consequently, during installation you will see some references to QuickTrace. These should be treated as references to LabelTrace.

Running the Installer on a Client PC

Ensure that you are logged on as Administrator. Use Explorer to view the folder

\\Servername\Qtinstl\Client\Vx

["Servername" should be replaced by the name of the PC with LabelTrace's data folder, Vx is the version reference]

Double click on "SETUP.EXE" to start the installation procedure.(Use the "View/Options menu selection of Explorer to ensure you can see the full file name, if necessary.)

Follow the on-screen instructions, accepting defaults offered unless there is some particular reason not to. The relevant data required may alternatively be entered in place of defaults.

Click "Finish" on the final Installer screen - this may be hidden behind an Explorer window which you may close. You may be asked to restart your PC before being able to use LabelTrace and we recommend that you do so, if requested. The installation will now complete and automatically provides a shortcut on the desktop (this shortcut is labelled "QuickTrace".)

Finally log on to LabelTrace. If the current version in use on the site is later than the version the installer provides, an automatic update mechanism will trigger a message to be displayed offering to apply an update. Respond Y to apply the update then restart LabelTrace. Note - on W95/98 PCs, if probelms with autoupdating occur, you should respond N and manually apply the updates by copying all files in the folder "\\servername\qtdata\updates" to the local folder "Qtrace97" then restarting LabelTrace.

When LabelTrace is running, ensure that the "Allow Partial Matches" checkbox is checked on the Patient Lookup and use the "View/System/LabelTrace Preferences/Local - Label Printer" menu option to allow for this - check the "Label Printer attached" check box, select the port, select the print density (7 for TLP2742, 12 for Companion, 10 for LP2824) and the handshaking(hardware for all printers except Companion type).

De-installing LabelTrace Client

To de-install LabelTrace Client, ensure that you are logged on as Administrator. Select Start/Settings/Control Panel/Add_Remove Programs option. Select QuickTrace from the list of software which can be removed and click "Add/Remove". Click OK to confirm and the deinstallation process will remove all components.

Instructions for Generating a New Extract of Patient Data

Vision

Run the Ad hoc Report "QuickTrace", accepting the default location for the output files (normally "C:\extract"). If these files already exist, you will be prompted to confirm that it is OK to overwrite each of these in turn - respond Yes to both.

EMIS5

From the EMIS Main Menu

ST - Search and Statistics
B - Patient Searches
R - Repeat a Search (return)
Select "QuickTrace"
Do you wish all date ranges moved forward?" - answer "Y"
When search is complete, will flash at top of screen.
S - Search Results
Select "QuickTrace"
F - Report names/addresses/aspects of patient record
Select "QuickTrace"
P - Print, view or export report
Export to Microsoft Excel
Accept "," as delimiter
[will save as C:\espool\stew.csv - folder must already exist]

Torex Synergie

Run the Report "QuickTrace".

Exeter

Generation of a new extract of patient data occurs automatically overnight.